



Catalyzing Change: A systemic review of Entrepreneur Support Organization (ESO) systems

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Colophon

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Dutch Good Growth Fund (DGGF)

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Disclaimer:

Catalyzing Change: A systemic review of ESO systems has been commissioned on behalf of DGGF. The findings and recommendations are provided at the discretion of the consultant, iGravity, and do not necessarily reflect the views of DGGF or its partners.

The conclusions in this report are based solely on the opinions of a limited number of experts and heavily rely on the authors' interpretations. Due to the confidential nature of the information, our methodology is predominantly qualitative, depending significantly on these interpretations. This report is a step towards better understanding the performance of various ESO systems and its respective functions. However, more detailed quantitative research involving a larger pool of ESO system actors is needed to obtain a comprehensive picture of the relative performance of different ESO system functions across developing countries and emerging markets.

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0 Executive summary

- **Entrepreneur Support Organization (ESO) systems are pivotal in fostering entrepreneurship** but face persistent, cross-cutting challenges, evidenced across five reviewed countries (Colombia, Kenya, Morocco, Senegal & Vietnam).
- **Four critical systemic hurdles**—financial sustainability, data transparency, human resource capacity, and public-private collaboration—**limit ESO effectiveness.**
- **Root causes vary by country** but often stem from short-term funding, weak institutional capacity, fragmented ecosystems, and skills shortages.
- **Targeted, system-level interventions can enhance ESO performance** by improving institutional resilience, strengthening enterprise support, and creating enabling environments.



0 Executive summary

Systemic hurdles hinders overall ESO performance. These hurdles impact multiple functions¹ within the ESO system and are interconnected. This interdependence calls for holistic approaches to address these challenges

Persistent system hurdles

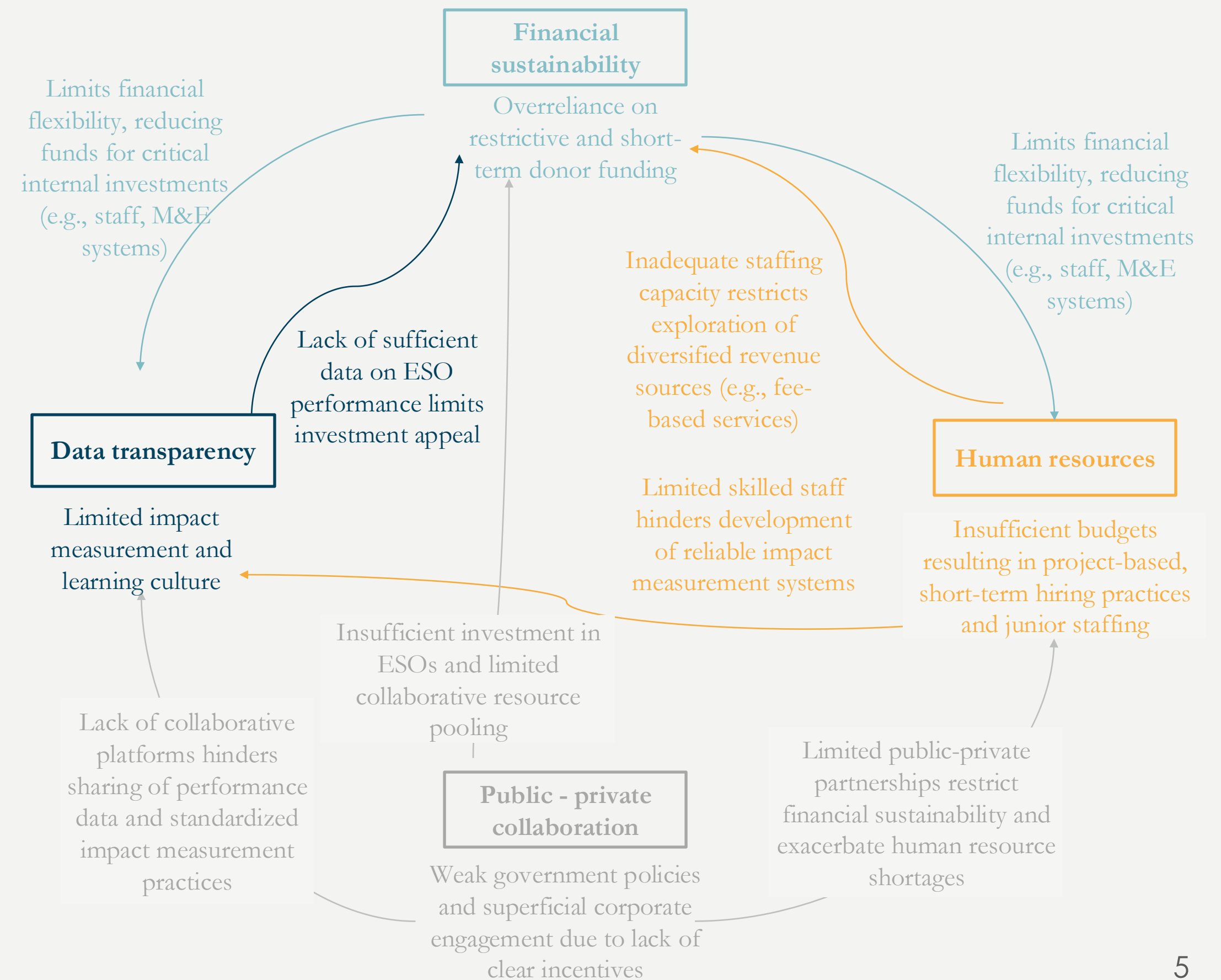
Financial sustainability Reliance on short-term donor funding and limited adoption of alternative revenue models constrain the ability of ESOs to sustainably operate and invest in long-term capacity.

Data transparency Lack of accessible databases and limited culture of sharing data hinders accountability, learning, and informed decision-making across the ESO systems.

Human resource Non-competitive salaries and project-based hiring practices lead to high turnover and skills gaps, especially in technical and management roles.

Public-private collaboration Weak strategic engagement, unclear incentives, and limited coordination reduce the effectiveness of ESO partnerships with corporates and government

System hurdles are interconnected and must be addressed through integrated system interventions.



¹ ESO systems can be broken down into three key functions: support functions: infrastructure, skills development, information, and services that enable market participation; core functions: demand and supply of ESO services; and rules and regulations: policies, laws, social norms, and informal rules that shape market behavior. (see [ESO system function slide](#))

0 Executive summary

Four critical leverage points² have been identified to address persistent systemic hurdles (table below). These leverage points reflect high-impact areas where targeted interventions can strengthen both institutional performance and ecosystem coordination. When implemented together, these leverage points offer a pathway for holistic and sustainable transformation of ESO systems.

Leverage points	Priority interventions
Financial diversification and cost management	Support ESOs to test and scale alternative models – e.g., service fees, equity-linked models, and corporate partnerships – to reduce donor dependency and enhance sustainability of ESO operations.
Data and impact measurement	Develop shared M&E frameworks/ standards and centralized data platforms to boost trust, transparency, and evidence-driven decision making across ESO system.
Human resource quality	Improve internal ESO HR and systems capacity, professional development, and service standards to better meet the needs of supported enterprises.
Stakeholder collaboration (advocacy and networks)	Facilitate cross-sector collaboration via co-investment models, joint programs, and network strengthening to unlock local resources and amplify impact.



²**Leverage points** are defined as factors with the most significant impact on the performance of the whole ESO system, as identified through the ESO system assessment. Leverage points provide specific areas where a well-planned intervention can create significant and lasting change, producing far-reaching positive effects. They also allow participants to achieve greater impact through collaboration rather than individual efforts. Therefore, this is not an exhaustive list, but an overview of priority intervention areas based on the ESO system assessment.

1 Introduction

The Dutch Good Growth Fund (DGGF), in collaboration with iGravity, is designing a multi-donor initiative to strengthen Entrepreneur Support Organizations (ESOs)—including incubators, accelerators, and angel investors—in emerging markets.

ESOs have proven effective in delivering Business Development Services (BDS) and mobilizing investment to spur enterprise growth, employment, and resilience.



High quality business development services (BDS)³ and investment accelerate enterprise growth in emerging markets and increase employment, incomes, and resilience.



ESOs proven to be an effective model for supporting enterprises (BDS and investment) across different growth stages – spurring the growth and sustainability of startups in emerging markets.

However, **systemic hurdles limit the impact and sustainability of ESO programs.**

The **ESO system assessment report seeks to identify persistent constraints that hinder the sustainability of the ESO systems** and pinpoint specific **leverage points to address these constraints.**

To achieve this objective, **the report examined five representative countries:** Colombia, Kenya, Morocco, Senegal, and Vietnam, to **uncover insights that are relevant to a wide range of developing countries and emerging markets.**

Ultimately, the **goal of the report is to connect like-minded ESO partners and ESOs to collaborate and move the sector toward a more sustainable future.**

The report is organized into 3 sections:

1. **Analytical framework:** overview of the market system development approach used to assess target ESO systems
2. **Key findings from the ESO system assessment:** constraints and root causes, potential leverage points, and interventions
3. **Appendix:** additional insights on assessed countries and identified system hurdles



³Business development services (BDS) are non-financial services offered by ESOs meant to help enterprises/ ventures tackle obstacles more effectively, speed up growth, and achieve greater scale. These services include acceleration, incubation, technical assistance, coaching, consulting, and other forms of non-financial support.

2 Analytical framework



The proposed approach adopts the Market System Development (MSD)⁴ framework as the overarching methodology to diagnose EOS system underperformance and identify and classify the main types of interventions to alleviate constraints.

Many development projects fail to deliver lasting change, often addressing symptoms rather than root causes. **MSD approach aims to create sustainable improvements by understanding and transforming market dynamics.**

Advantages

- **Sustainability** Ensuring long-term benefits for ESO systems that persist beyond the project period, fostering self-sustaining system improvements.
- **Scale of Impact** Driving widespread improvements that positively affect ESOs, entrepreneurs, and other ESO system stakeholders beyond the initial project scope.



ESO System Analysis

- A rigorous, data-driven process to understand market system dynamics.
- Identifies **underlying constraints preventing the system to work and their interconnections.**



Promotion of Local Solutions

- Rather than directly providing solutions, **MSD catalyzes local behavior change.**
- Empowers local actors to drive sustainable, market-driven solutions.



Iterative Approach

- Recognizes the complexity of challenges and adjusts interventions accordingly.
- **Projects designed to iteratively test solutions, measure impact, and refine strategies** for long-term effectiveness.

Key features



⁴The Springfield Centre (2015) [The Operational Guide for the Making Markets Work for the Poor \(M4P\) Approach](#), 2nd edition funded by SDC & FCDO (DFID)

3 Key findings: ESO system assessment

The report adapts the **MSD approach** to assess target ESO systems and generate key findings. The **final methodology** consists of two key steps to identify persistent ESO system hurdles and determine priority interventions

Step 1

Identify ESO system constraints and root causes

Output: manifestation of persistent system hurdles across reviewed countries

Step 2

Determine leverage points and interventions

Output: underlying drivers of constraints and potential high-impact and feasible interventions



Step 1

Identify ESO system constraints and root causes

Output: manifestation of persistent system hurdles across reviewed countries

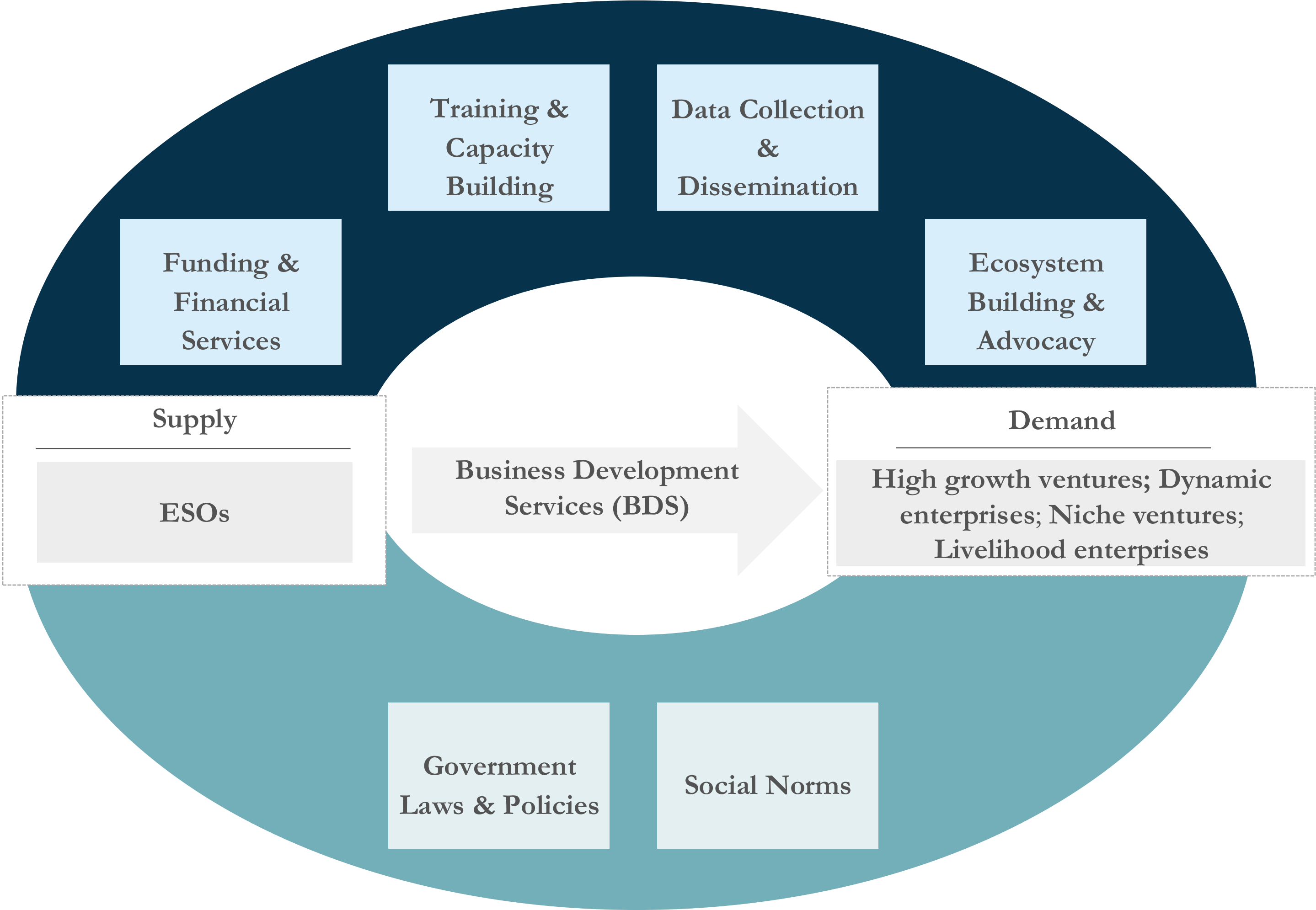
Objective: Determine persistent system hurdles that limit the effectiveness of ESO systems

- ✓ Introduce persistent system hurdles
- ✓ Highlight how they manifest across reviewed markets
- ✓ Map ESO functions & their links to identified constraints



The ESO system assessment analyzes the performance of priority functions....

Support functions: Infrastructure, skills development, information, and services that enable market participation.



Rules and regulations: Policies, laws, social norms, and informal rules that shape market behavior.



.... across four hurdles hindering scalable and sustainable ESO support

Financial Sustainability for an ESO is its capacity to cover its recurring and rationalized operating costs through predictable revenue streams, without relying on restricted short-term grants.

- ESO sector is **largely financed by international donors**, with some additional revenue streams from entrepreneurs' fees, consulting fees or local corporate programs.

Human resource constraints refer to the challenges ESOs encounter in recruiting, developing, and retaining skilled talent necessary to deliver high-quality entrepreneurial support services

- **Lack of managerial capacity** to design financially sustainable strategies and the **limited access to talents for mid-level positions** to execute on the ESO ambitions

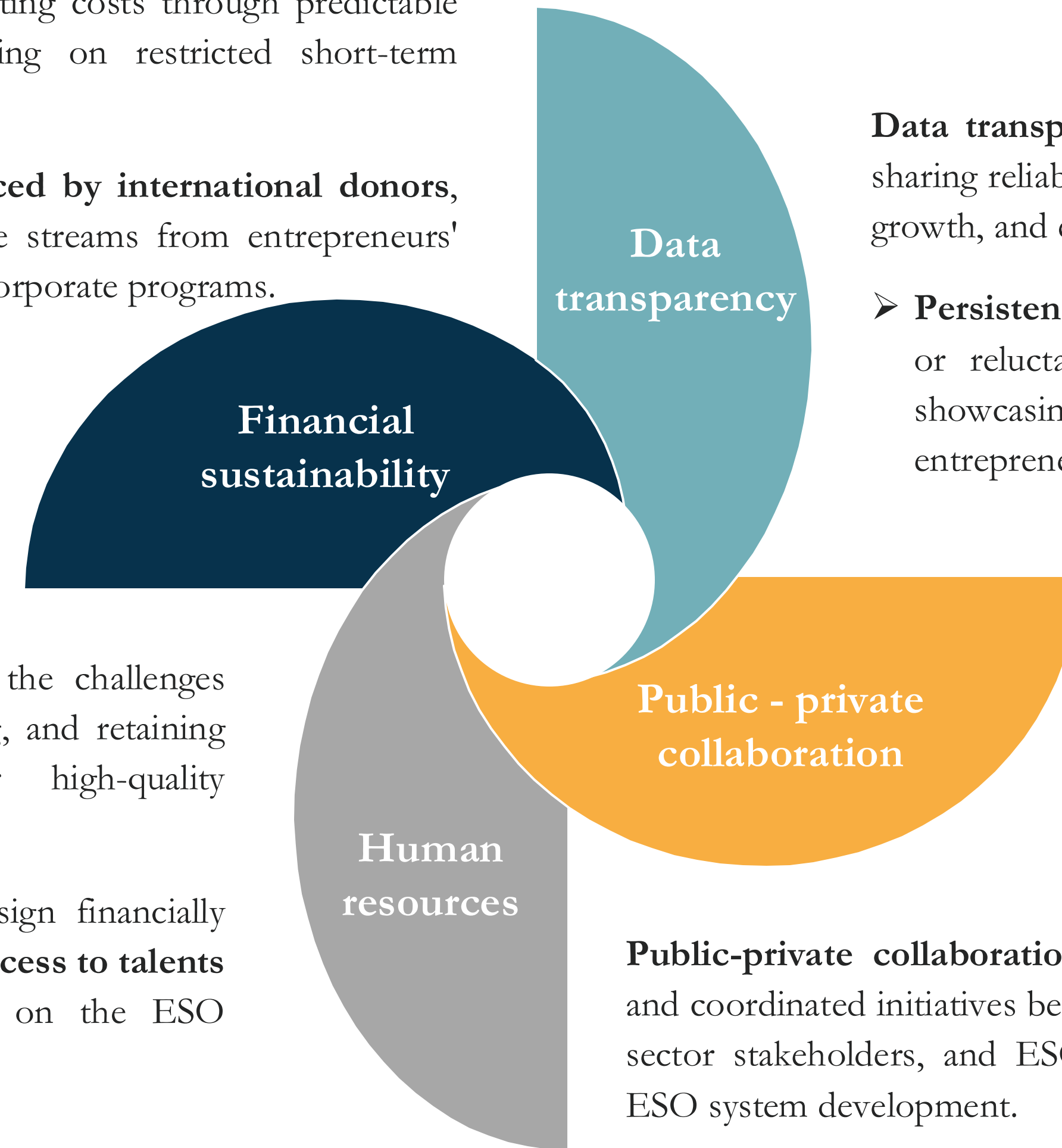
Data transparency involves systematically collecting, managing, and sharing reliable and consistent data about ESO performance, enterprise growth, and ecosystem impact.

- **Persistent data gaps exist** between entrepreneurs who are not able or reluctant to share data and ESOs who have a hard time showcasing the benefits of their support to financiers and entrepreneurs.

Public - private collaboration

Public-private collaboration refers to structured partnerships and coordinated initiatives between governmental entities, private-sector stakeholders, and ESOs, aimed at effectively supporting ESO system development.

- **Lack of domestic appreciation and support for ESOs** at country level. Local governments and the private including corporate sectors are natural allies of the ESO sector



Findings: Constraints driving systemic hurdles are common across countries....

Financial sustainability

- **Primary funder type:** restrictive funding limits ESO capacity to sustainably deliver interventions
- **Types of enterprises served, and services provided:** target enterprise segments influence ability of ESOs to implement fee-based models
- **Cost structures:** high upfront operational costs leading to significant cash-flow challenges
- **Prevailing revenue models:** despite sustainable revenue model emerging adoption is limited

Human resources

- **Financial limitations** linked to short-term donor funding structures, **force ESOs into project-based hiring with limited employment security**, resulting in high staff turnover
- **Salaries offered by ESOs are generally non-competitive** compared to the private sector or international organizations, causing frequent loss of skilled professionals
- **Skill gaps are prevalent across ESOs, particularly in specialized roles** with a lack of structured professional development and clear career progression paths

Data transparency

- **Lack of data protection policies:** Organizations hesitate to share data due to confidentiality concerns, regulatory scrutiny, competition, and tax implications
- **Fragmented reporting standards:** ESOs struggle with inconsistent reporting formats when communicating with funders and investors
- **Limited collaboration:** ESOs often view each other as competitors, hindering data sharing and collaboration
- **Underfunded monitoring and evaluation:** Many ESOs have weak monitoring and evaluation systems, with little funding dedicated to improving them

Public/private collaboration

- Governments focus on short-term, restrictive funding models and **do not consistently engage strategically with ESOs or private-sector actors**
- **Absence of clear regulatory frameworks and incentives** further discourages sustainable private-sector investment in the broader entrepreneurial ecosystem
- **Corporate involvement is often superficial**, with organizations often establishing internal incubation and acceleration programs, rather than collaborating strategically with external ESOs

Findings: but extent to which they manifest varies



Despite the similarities in high-level constraints, the context of each country influences how these constraints manifest. The ESO system analysis must assess performance through the lens of each country and provide context-specific recommendations using a facilitative approach.

Financial sustainability

- **Service-Only ESOs:** Focus on enterprise development through mentorship, training, networking, and incubation. They are donor-dependent and **common in Morocco, Senegal, and Kenya**
- **Investment-Linked ESOs:** Include funding mechanisms like equity stakes, revenue-sharing, or debt financing, **prevalent in Vietnam, Colombia, and emerging in Morocco and Kenya**

Human resources

- **Professional training and structured mentoring programs** are often overlooked due to lack of resources and short-term funding constraints in **Kenya, Morocco, Senegal**
- **Mature startup entrepreneurs increasingly becoming mentors in Vietnam**, strengthening informal networks and ESO expertise

Data transparency

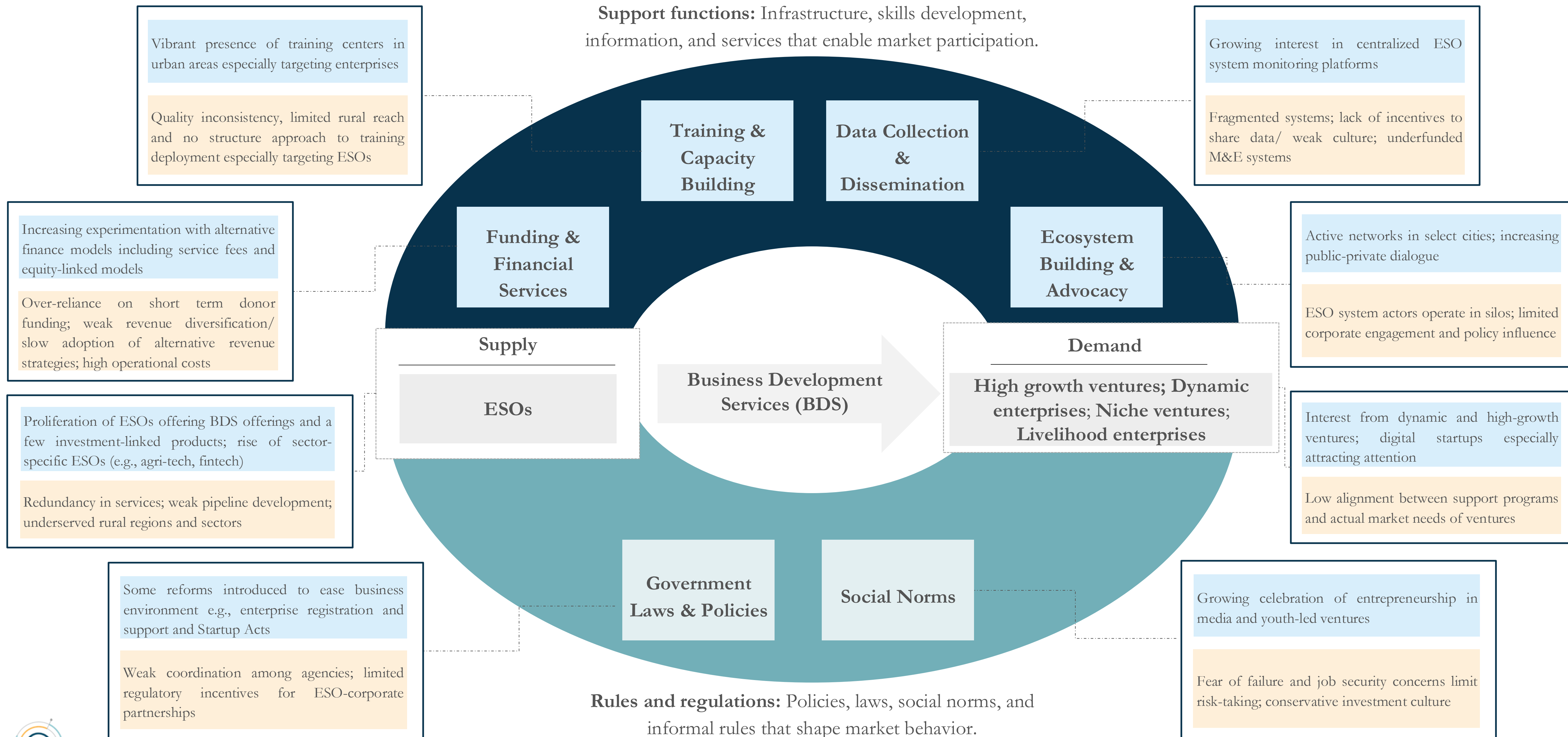
- **Growing acknowledgment of value of data transparency in Kenya** despite low implementation with examples cited (e.g., VilCap)
- **Morocco and Senegal lack standardized data repositories**, instead heavily relying on informal networks
- Strong external (investor-driven) pressure for **ESOs in Vietnam and Colombia** to improve **data transparency** leading to some progress

Public/private collaboration

- **Restrictive regulatory framework** hindering enterprise growth and investment flexibility in Vietnam
- Despite challenges in collaboration, **Colombia still has robust governmental support** for enterprise development including ESOs

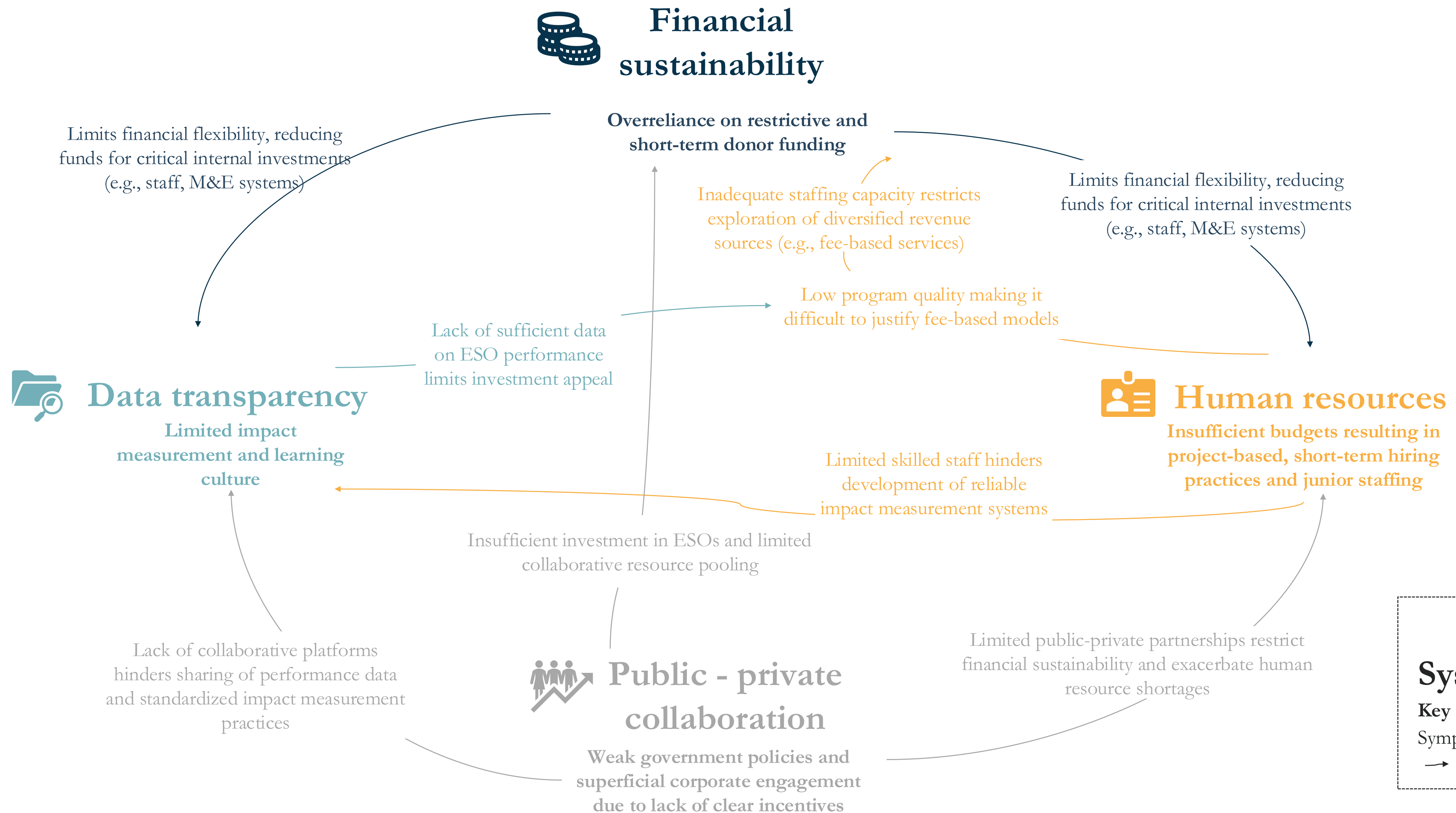
Findings: Key constraints can be mapped to priority ESO functions

Observed Strengths
Common Weaknesses



Findings: ESO system hurdles are interconnected, calling for a holistic approach

Illustrative example of identified linkages in ESO system hurdles across reviewed countries.



Step 2

Determine leverage points and interventions

Output: underlying drivers of constraints and potential high-impact and feasible interventions

Objective: Determine key leverage points within ESO system and determine potential interventions.

- ✓ Determine root causes with most impact on ESO system
- ✓ Identify potential leverage points within ESO system
- ✓ Highlight sample of potential interventions



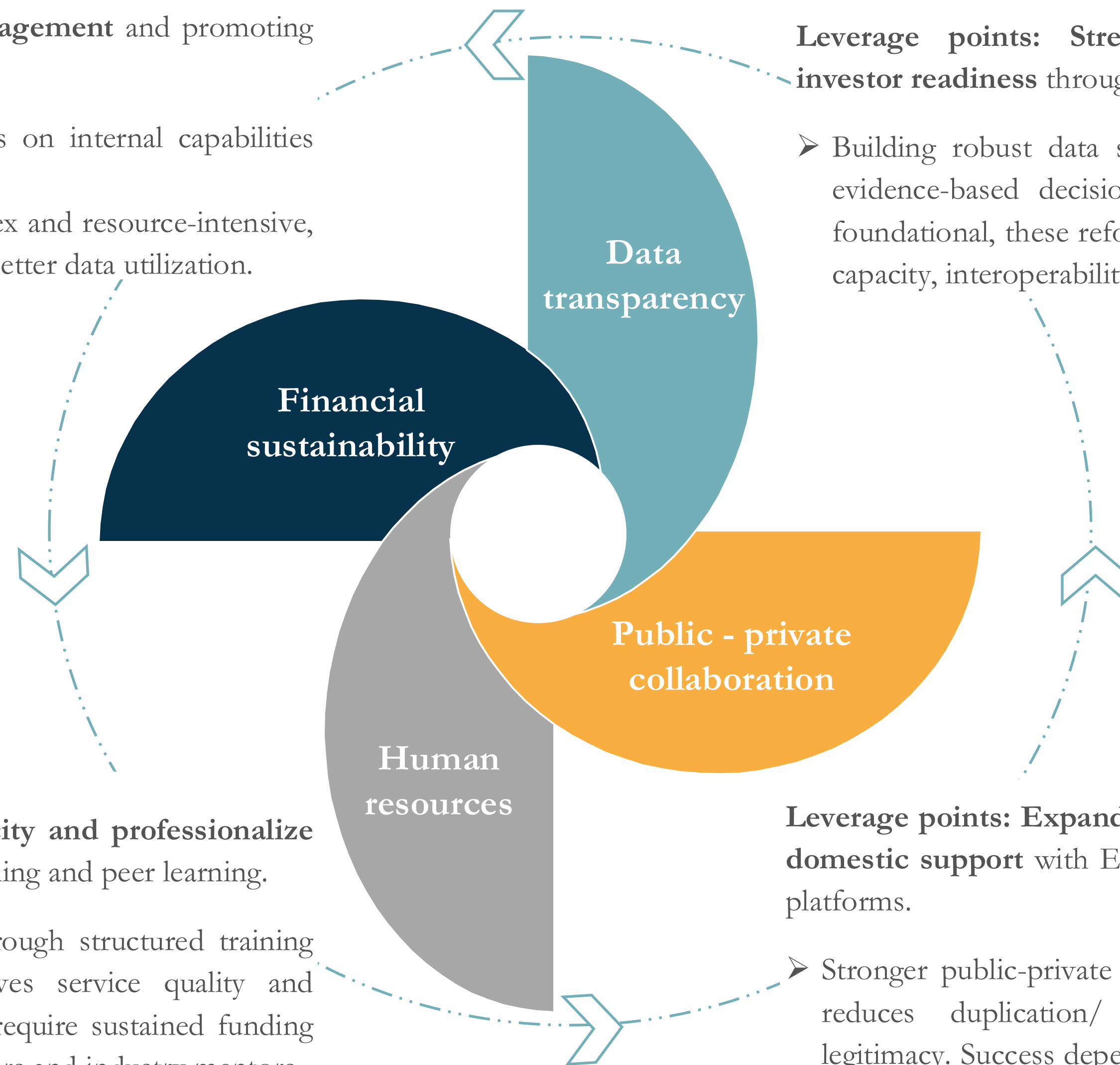
Initiative designed around a combination of leverage points per system hurdle

Leverage points: Enhanced cost management and promoting financial diversification.

- Improving cost management depends on internal capabilities and can be achieved in the short term.
- Diversifying revenue models is complex and resource-intensive, requiring increased collaboration and better data utilization.

Leverage points: Strengthen ESO decision-making and investor readiness through improved M&E and data systems.

- Building robust data systems enhances transparency, supports evidence-based decisions, and increases investor trust. While foundational, these reforms require upfront investments in M&E capacity, interoperability, and cross-actor coordination.



Leverage points: build internal capacity and professionalize ESO service delivery via structured training and peer learning.

- Professionalizing ESO operations through structured training and leadership development improves service quality and institutional resilience. These efforts require sustained funding and collaboration with training providers and industry mentors.

Leverage points: Expand co-investment mechanisms and align domestic support with ESO needs through policy and partnership platforms.

- Stronger public-private coordination improves resource pooling, reduces duplication/ fragmentation, and broadens ESO legitimacy. Success depends on aligning priorities, clear incentives, and platforms for cross-sector dialogue and joint implementation



Set of interventions that serve as foundation for co-creation with partners

System hurdle	Desired change/ result	Illustrative interventions	Additional hurdles	Target ESO support function	Potential partners
Financial sustainability	• Demonstrate impact of alternative revenue models	• Incentivize ESO to explore alternative revenue models: fee-based, corporate sponsorship, equity-linked services, and other relevant models • Establish and diversify ESO services towards corporates to unlock mergers and acquisition and foster industry. • Provide institutional funding during transition to new revenue models	• ESO strengthening (HR, M&E, etc.)	• Core functions: ESO	• Donor and government ESO system initiatives/ funders, corporate partners, ESO TA providers, VCs/ investors
	• Document and share best practices	• Develop case studies highlighting successful ESO revenue diversification strategies, capturing key insights and lessons learned and facilitate learning dissemination e.g., networking events to showcase successful ESO financial models	• Data transparency and public-private collaboration	• Support functions: Funding and financial services and data collection & dissemination and	• ESO learning partners/ funders (public and private) and conveners
	• Influence donor landscape	• Be a leading voice for true partnership with ESO including structuring long-term outcome and impact-oriented relationships between funders and ESOs	• Public-private collaboration	• Support functions: Funding and financial services	• ESO funder roundtables
Data transparency	• Strengthen ESO impact measurement capacity	• Provide technical and financial support to build robust Monitoring and Evaluation (M&E) systems, enabling ESOs to consistently measure, report, and leverage their impact data.	• Human resource	• Core functions: ESO	• ESO learning partners (public and private), impact measurement organizations, ESO TA providers
	• Probe data needs for systemic risk management and consumer protection	• Map the relevance and need for data transparency of public sector actors to facilitate private capital market growth whilst managing systemic risks and protect consumers and support public sector actors in defining better their role in facilitating data.	• Public-private collaboration	• Support functions: Data collection & dissemination	• ESO funder roundtables and relevant government institutions
	• Improve data platforms to facilitate investment deals better	• Invest in improving utility, user experience, and viability of existing data platforms accessible to ESOs, donors, policymakers, and enterprises for data-driven decision-making facilitating investment flows and deal-making.	• Financial sustainability	• Support functions: Data collection & dissemination and ecosystem building and advocacy	• Donor and government ESO system initiatives/ funders with emphasis on data collection

Set of interventions that serve as foundation for co-creation with funders

System hurdle	Desired change/ result	Illustrative interventions	Additional hurdles	Target ESO support function	Potential partners
Human resources	<ul style="list-style-type: none"> Establish professional development programs 	<ul style="list-style-type: none"> Facilitate structured professional development programs for ESO staff in collaboration with training institutions and universities C-Suite level capacity strengthening to accelerate transition to viable ESO business models and efficient ESO management. 	<ul style="list-style-type: none"> ESO strengthening (HR, M&E, etc.) 	<ul style="list-style-type: none"> Core function: ESO Support functions: Training and capacity building 	<ul style="list-style-type: none"> Donor and government ESO system initiatives/ funders, Universities and relevant training institutions, ESO TA providers
	<ul style="list-style-type: none"> Facilitate Peer Learning Networks 	<ul style="list-style-type: none"> Enable knowledge exchanges between local ESOs and experienced international organizations to share practical solutions and innovative practices on viable ESO business models, effective, high quality business services and delivery models. 	<ul style="list-style-type: none"> Public-private collaboration 	<ul style="list-style-type: none"> Support functions: Ecosystem building 	<ul style="list-style-type: none"> ESO learning partners (public and private) and conveners
	<ul style="list-style-type: none"> Standardize ESO Quality Frameworks 	<ul style="list-style-type: none"> Develop, socialize, and implement clearly defined ESO operational standards and service quality benchmarks through practical toolkits and ESO networks. 	<ul style="list-style-type: none"> Financial sustainability 	<ul style="list-style-type: none"> Support functions: Training and capacity building 	<ul style="list-style-type: none"> Donor and government ESO system initiatives/ funders, ESO TA providers
Public - private collaboration	<ul style="list-style-type: none"> Establish more effective networks and exchange with a wider range of financial intermediaries 	<ul style="list-style-type: none"> Facilitate better collaboration and partnerships between ESOs and different financial intermediaries (including local banks) that is backed by a viable commercial model (e.g. commission, exit, etc.). 	<ul style="list-style-type: none"> Financial sustainability 	<ul style="list-style-type: none"> Support functions: Ecosystem building and advocacy 	<ul style="list-style-type: none"> ESO learning partners/ funders (public and private) and conveners
	<ul style="list-style-type: none"> Attract new/ diverse type of partners 	<ul style="list-style-type: none"> Develop concrete partnership models (e.g., sponsorships, advisory committees, co-investments) attracting corporates and private-sector participation. 	<ul style="list-style-type: none"> Financial sustainability 	<ul style="list-style-type: none"> Support functions: Ecosystem building and advocacy 	<ul style="list-style-type: none"> Corporate funders, investors, banks
	<ul style="list-style-type: none"> Improve policy frameworks and the use of policy tools including public private collaboration 	<ul style="list-style-type: none"> Support and advocate policy reforms: better and new industry, innovation, and capital market legal frameworks, to facilitate growth of investments, increase option for exits, and strengthening business growth and resilience. 	<ul style="list-style-type: none"> Public-private collaboration 	<ul style="list-style-type: none"> Support functions: Ecosystem building and advocacy and rules and regulations 	<ul style="list-style-type: none"> Relevant ministries, agencies local governments institutions, and enterprise support umbrella organizations

4 Call to action

Join Us to Shape the Future of ESO Support: The ESO Scale-up initiative is still under development, providing an excellent opportunity for stakeholders to contribute strategically.

Specifically, partners gain direct input into strategic direction and have an opportunity to shape impactful interventions. Proposed partnership engagement areas:

- ✓ Co-designing targeted interventions leveraging your strategic insights and funding priorities.
- ✓ Collaborative piloting of innovative financial, data-sharing, human resource, and policy-related solutions.
- ✓ Joint advocacy initiatives to improve policy frameworks and public-private cooperation for ESO growth.

Next steps include:

1. Follow-up discussions with interested funders.
2. Co-creation workshops to align strategic priorities and intervention details.



Dutch Good Growth Fund (DGGF)

Name: : Julia Kho

Email: Jkho@triplejump.eu

DGGF is engaging ESO partners to commence co-creation process

Examples of potential activities



1

Agree on **main vision** with ESO partners

- **Define the shared ambition:** Strengthen ESO systems to support enterprises through improved financial sustainability, talent, data infrastructure, and public-private alignment.
- **Agree on outcomes:** System-wide improvements in ESO performance (institutional), enterprise success, and actor coordination.
- **Clarify ESO positioning and role of funders:** ESOs as essential intermediaries, not just project implementers and funders as enablers.

Agree on **initiative parameters**

2

- **Scope:** Define geographic focus (e.g., country/regional pilots) and thematic priorities (e.g., financial diversification, human resource capacity).
- **Funding structure:** Blend ESO core support and intervention-specific/ ecosystem financing.
- **Partnership model:** Identify roles and responsibilities of key stakeholders: funders, knowledge partners, and implementation actors.

3

Agree on **priority interventions** and deploy support

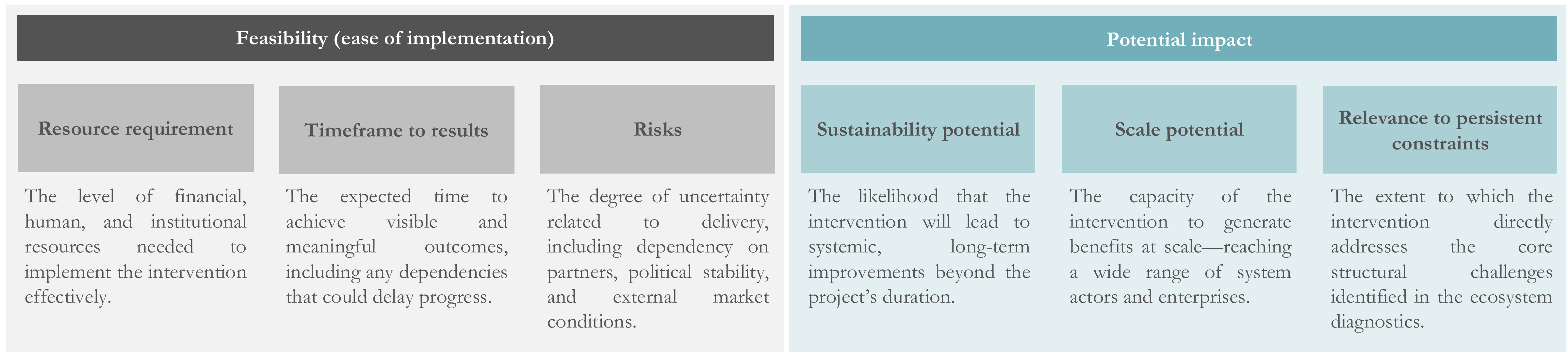
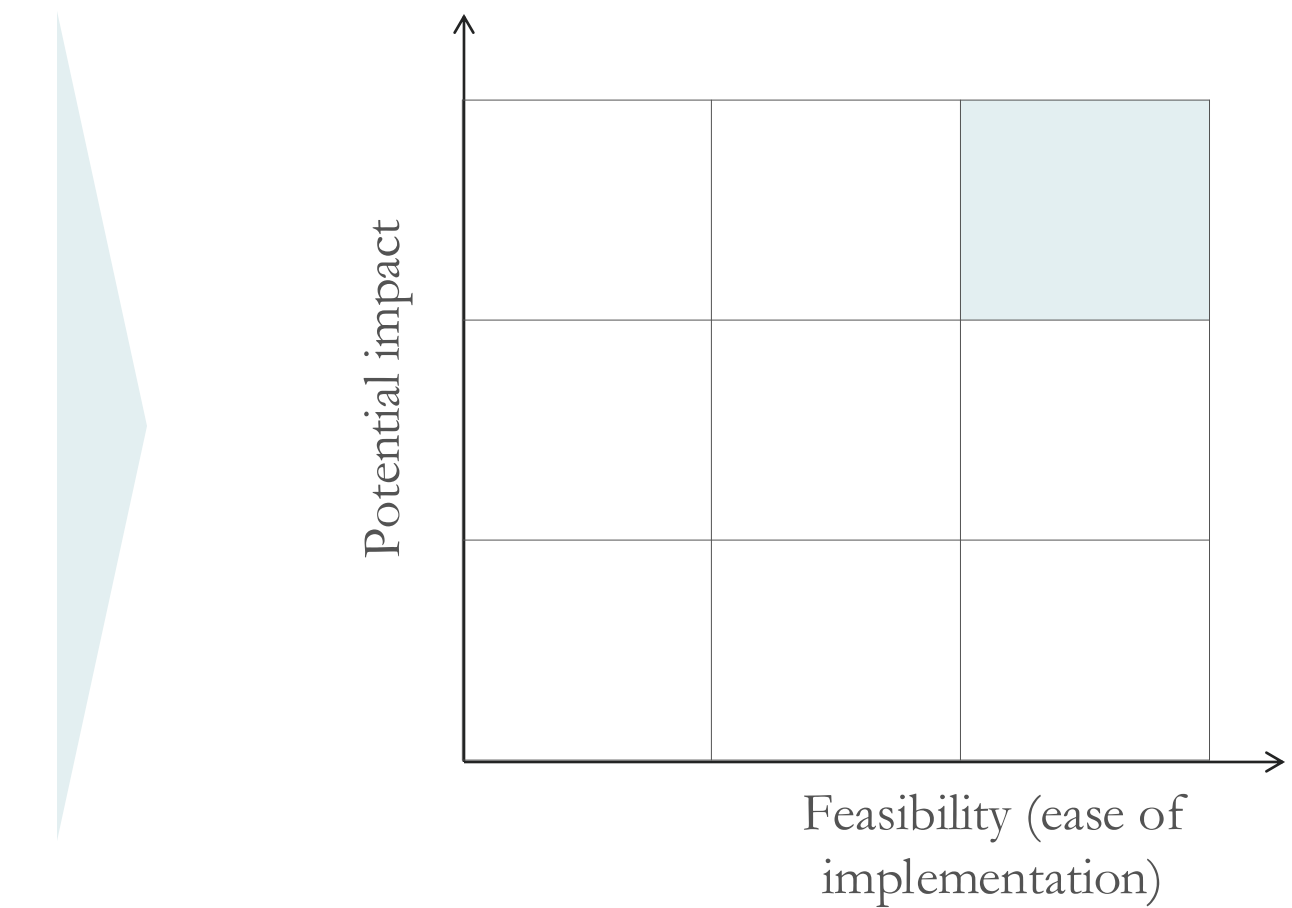
- **Select interventions:** Use the feasibility-impact matrix to identify high-priority, high-impact actions.
- **Deploy flexible and context-specific support:** Tailored TA, grants, and policy engagement support to unlock constraints.
- **Coordinate rollout:** Joint implementation plans with shared monitoring and learning agenda.

Overview of intervention selection criteria to consider during co-creation

Upcoming steps will identify and prioritize targeted interventions designed to address the ESO-specific constraints diagnosed in Step 2 to ensure partner resources are strategically directed toward high-impact interventions.

By systematically assessing feasibility and potential impact, the program selects interventions most capable of sustainably enhancing ESO performance—both institutionally and enterprise outcomes—in each target region. Given diverse country contexts, interventions are adapted to local realities, and not every ESO system will have interventions covering all four leverage points.

The diagram below provides an overview of key considerations.

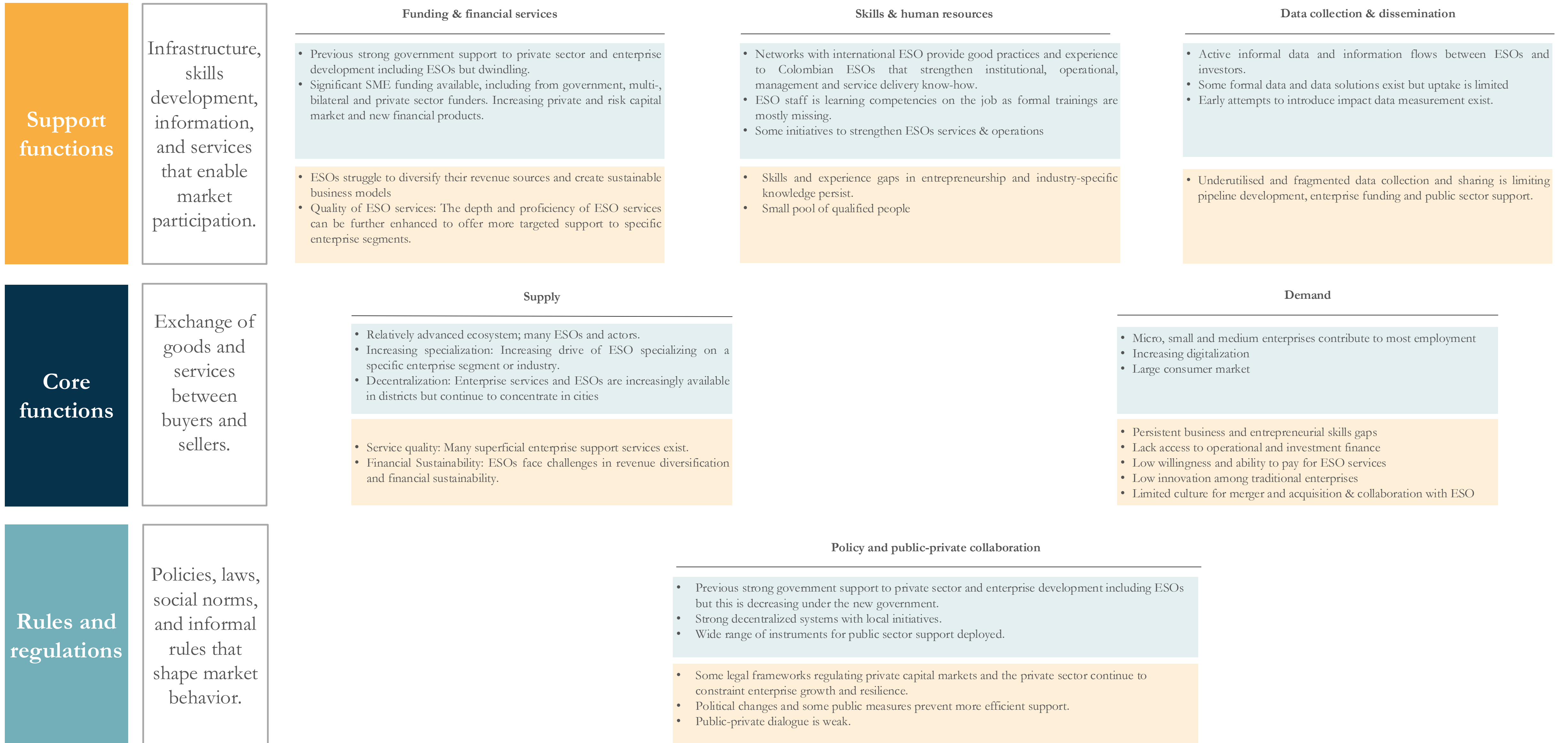


5 Appendix I: overview of reviewed ESO systems performance



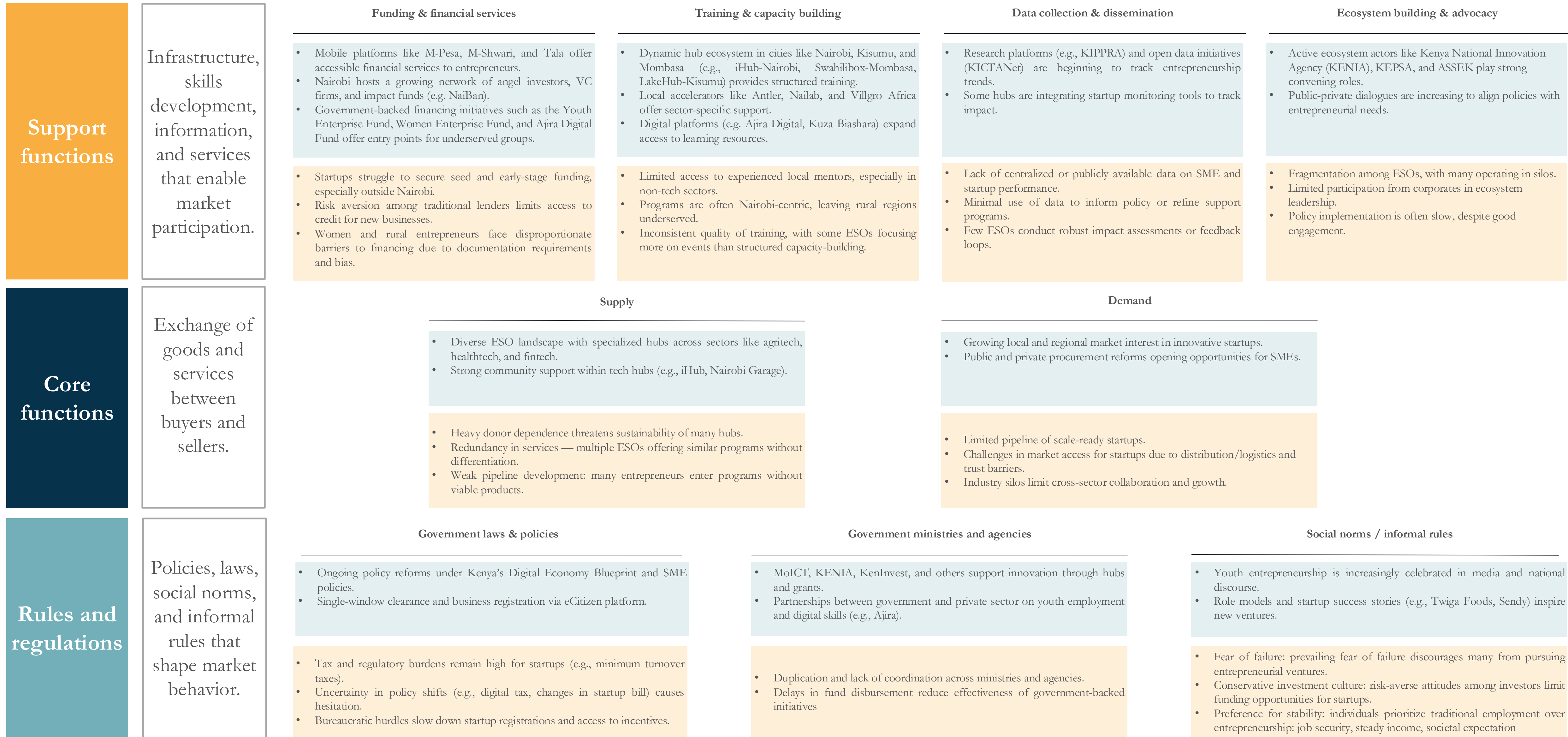
Performance of key functions in Colombian ESO system is varied

Strength
Underperformance



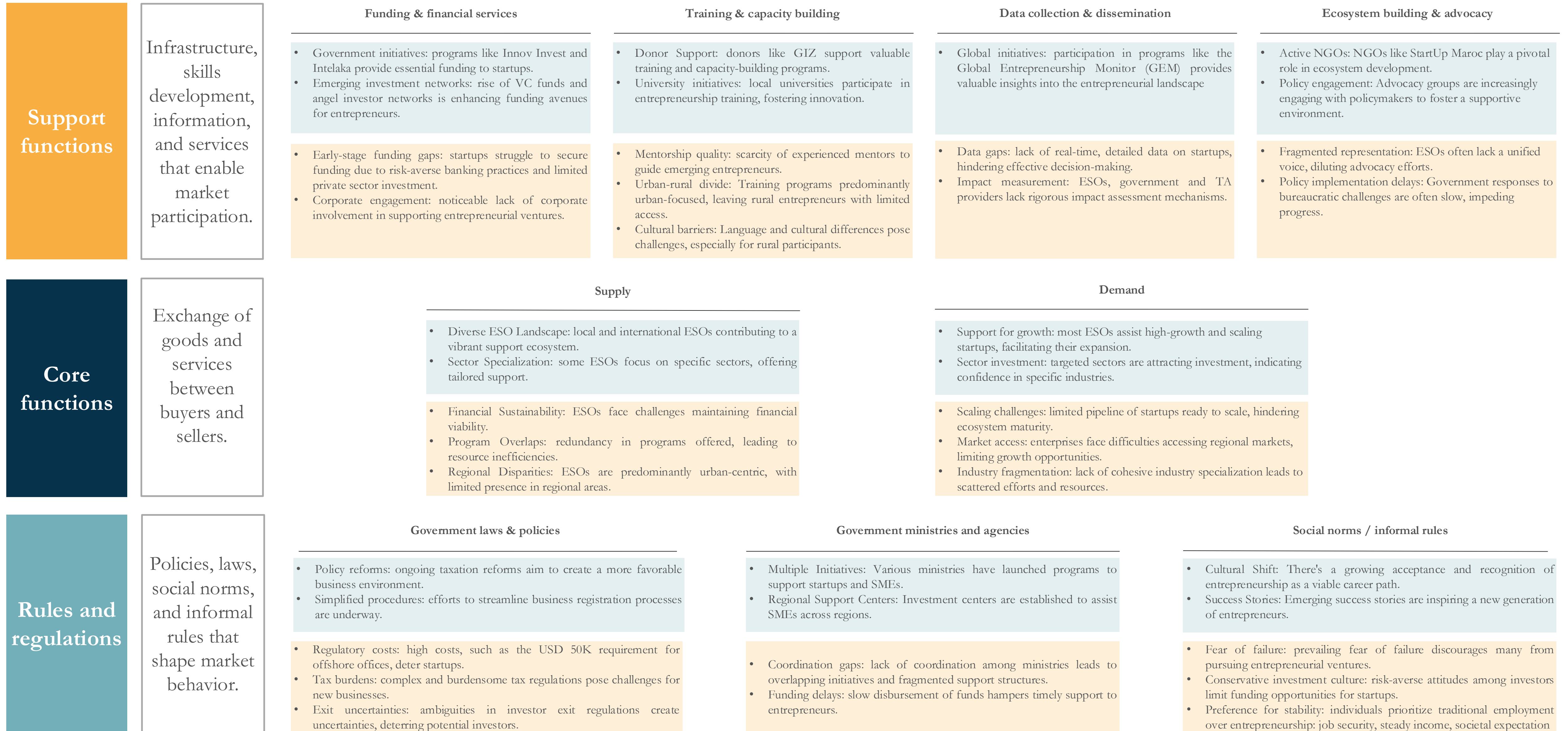
Performance of key functions in Kenya ESO system is varied

Strength
Underperformance



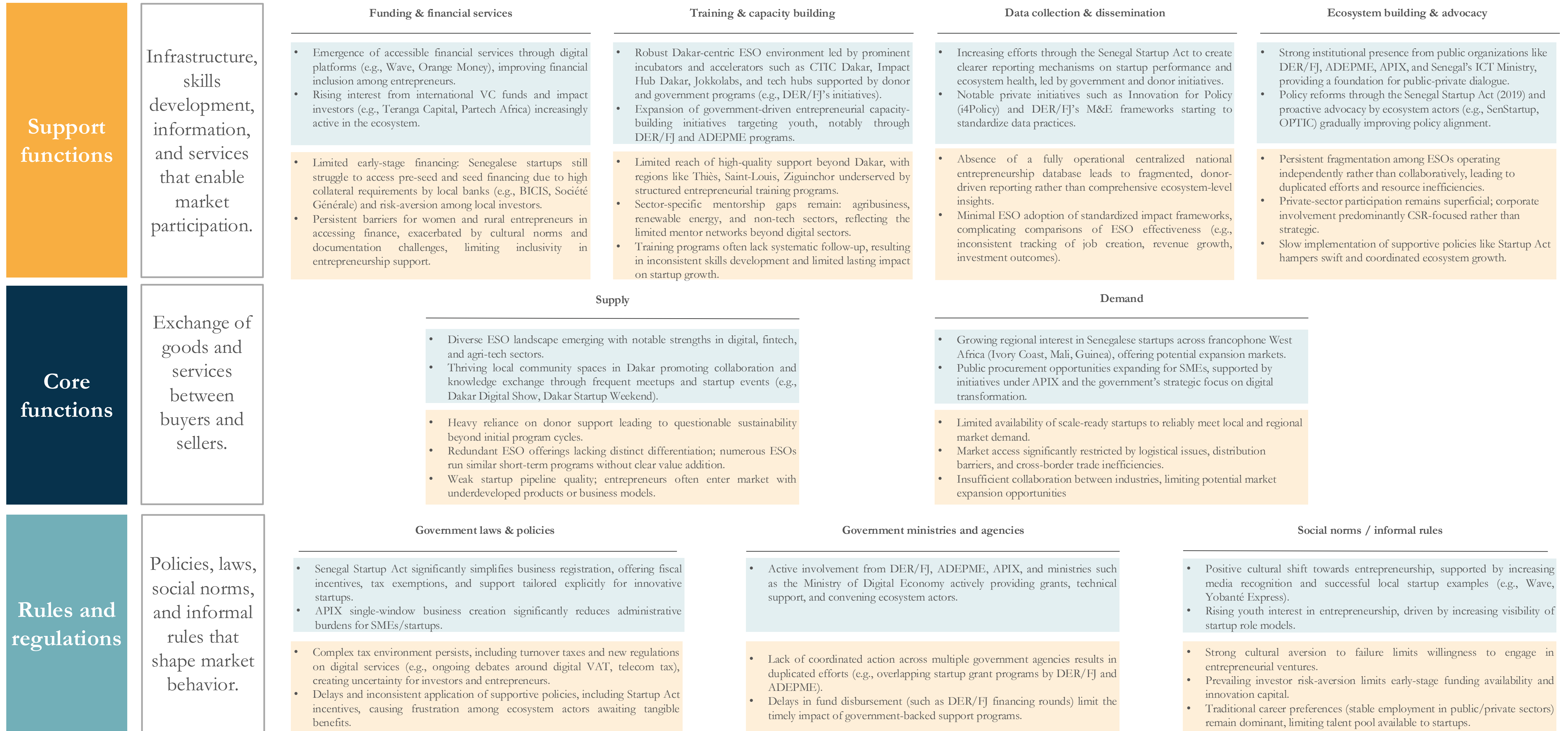
Performance of key functions in Morocco ESO system is varied

Strength
Underperformance



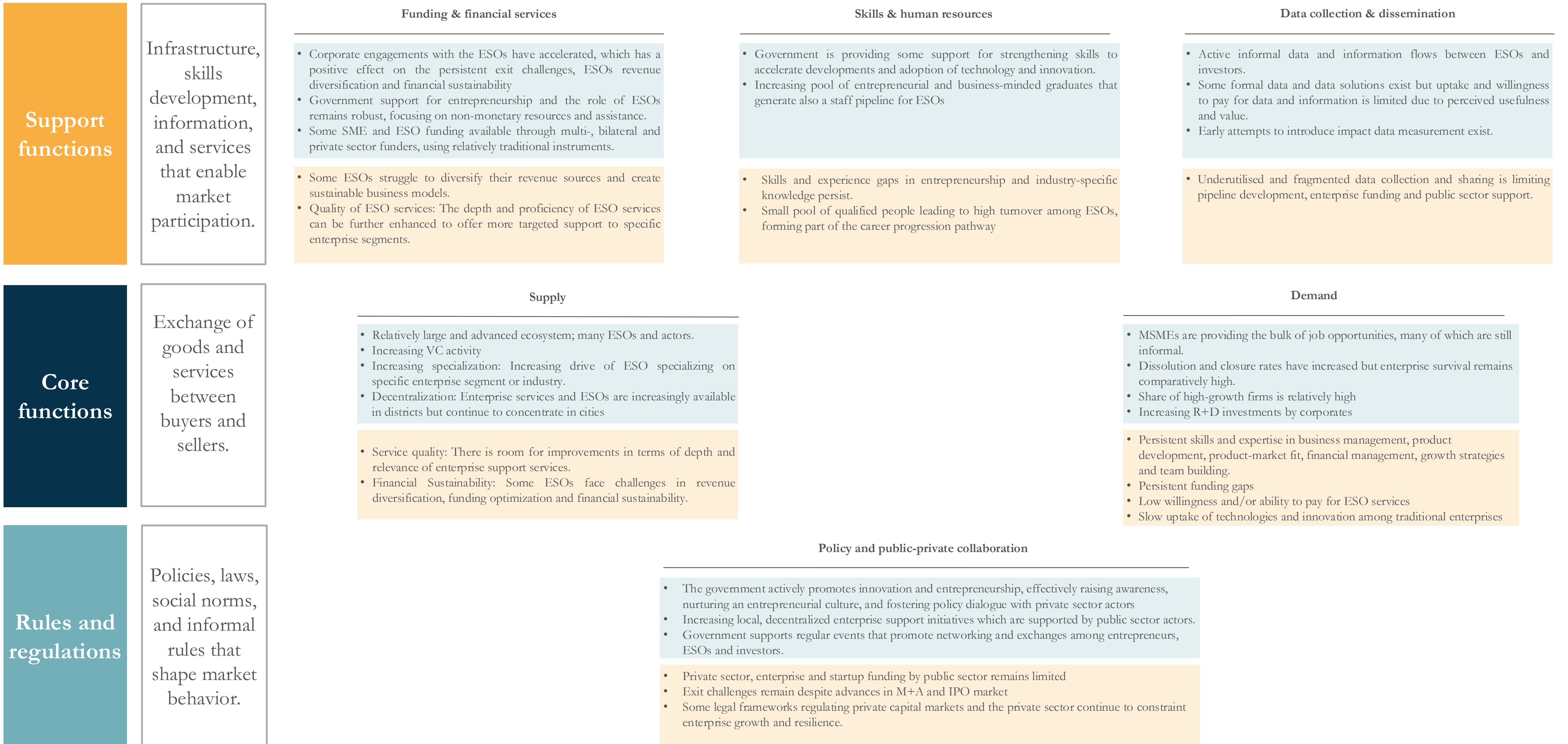
Performance of key functions in Senegal ESO system is varied

Strength
Underperformance



Performance of key functions in Vietnamese ESO system is varied

Strength
Underperformance



5 Appendix II: overview of approach to select leverage points

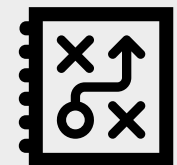


Identified root causes were ranked based on their potential to unlock changes

To effectively **unlock the web of constraints facing ESO systems**, a holistic approach is required to **target the key drivers of underperformance rather than engaging with constraints individually**.

We **define leverage points as factors with the greatest degrees of influence on the performance of an ESO system**, as identified through the constraints analysis and country context.

Targeting these factors **is expected to create sustainable positive change** to the ESO system in the medium-long-term



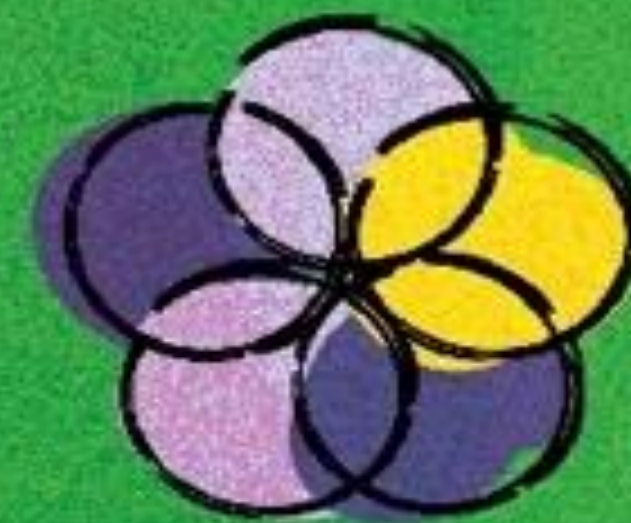
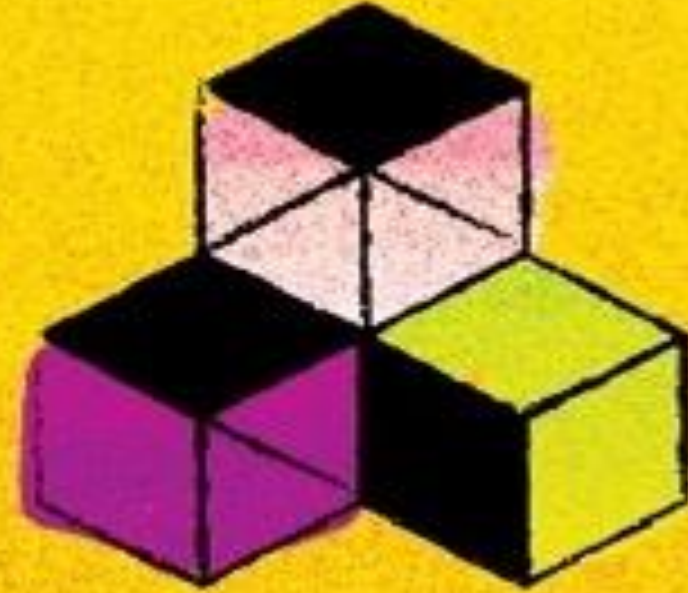
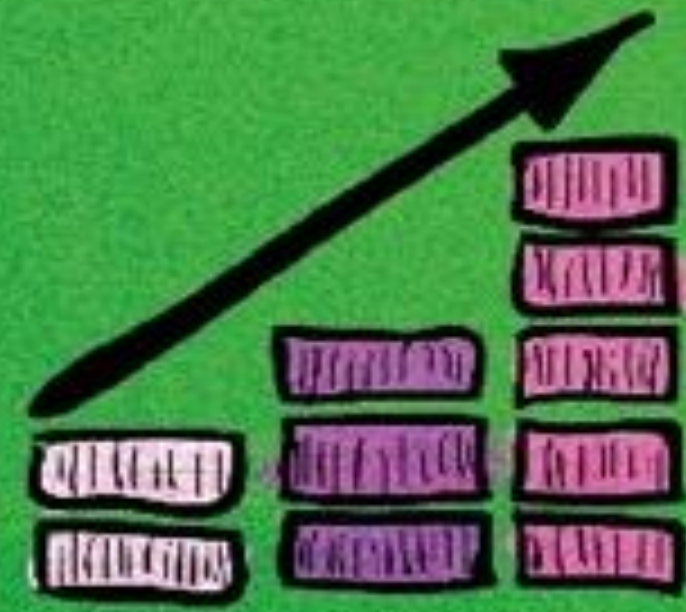
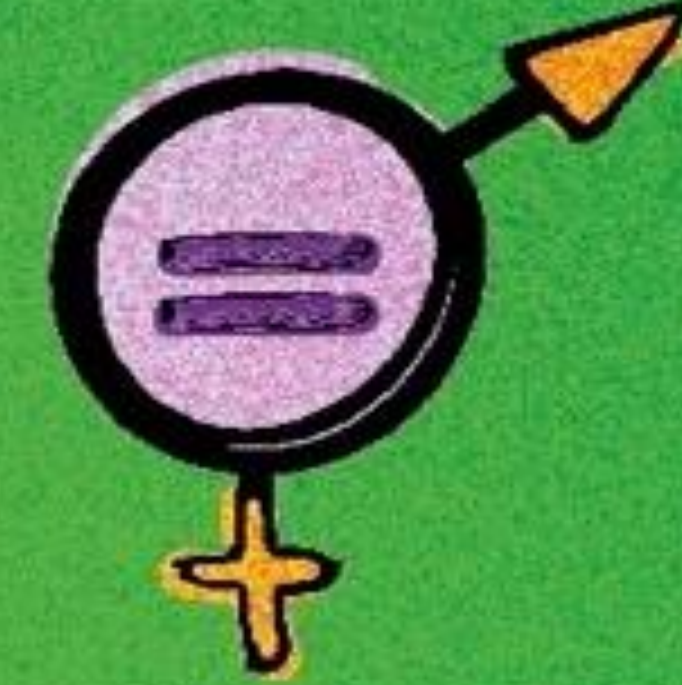
The report assessed root causes identified in the ESO system assessment to **pinpoint areas where targeted change can unlock broader ESO system improvement**.

Selection criteria include:

- **Causal centrality:** Which constraints have the most downstream effects?
- **Recurrence across contexts:** Which constraints appear in multiple countries or ecosystems?
- **Addressability:** Which constraints would be responsive to policy or programmatic solutions?
- **Momentum:** Are actors showing appetite for reform or emerging best practices?

Selected leverage points and their systemic influence

Leverage points	Why it matters
Financial Diversification and Cost Management	Enables revenue diversification and disciplined cost management; supports transition from grant dependency to internally generated income; ensures operational costs are sustainably covered to enhance ESO resilience and long-term viability.
Human Resource Quality	Builds robust internal capacity by attracting and retaining skilled staff; reduces turnover through structured professional development; ensures service quality and institutional memory to meet evolving startup demands.
Data and Measurement Learning	Impact & Strengthens performance monitoring and strategic decision-making; supports accountability to funders and enterprises; fosters a culture of continuous learning through standardized and transparent data practices.
Stakeholder Collaboration	Unlocks shared value through joint programming, pooled funding, and cross-sector dialogue; enhances policy advocacy strength; reduces siloed interventions and strengthens ecosystem-wide resilience and innovation.




SUSTAINABLE
DEVELOPMENT
GOALS